

Overview:

Agency Managers have the ability to act on behalf of the Agents within the Agency, enabling them to step in to complete tasks or assist consumers in the Agent's Book of Business.

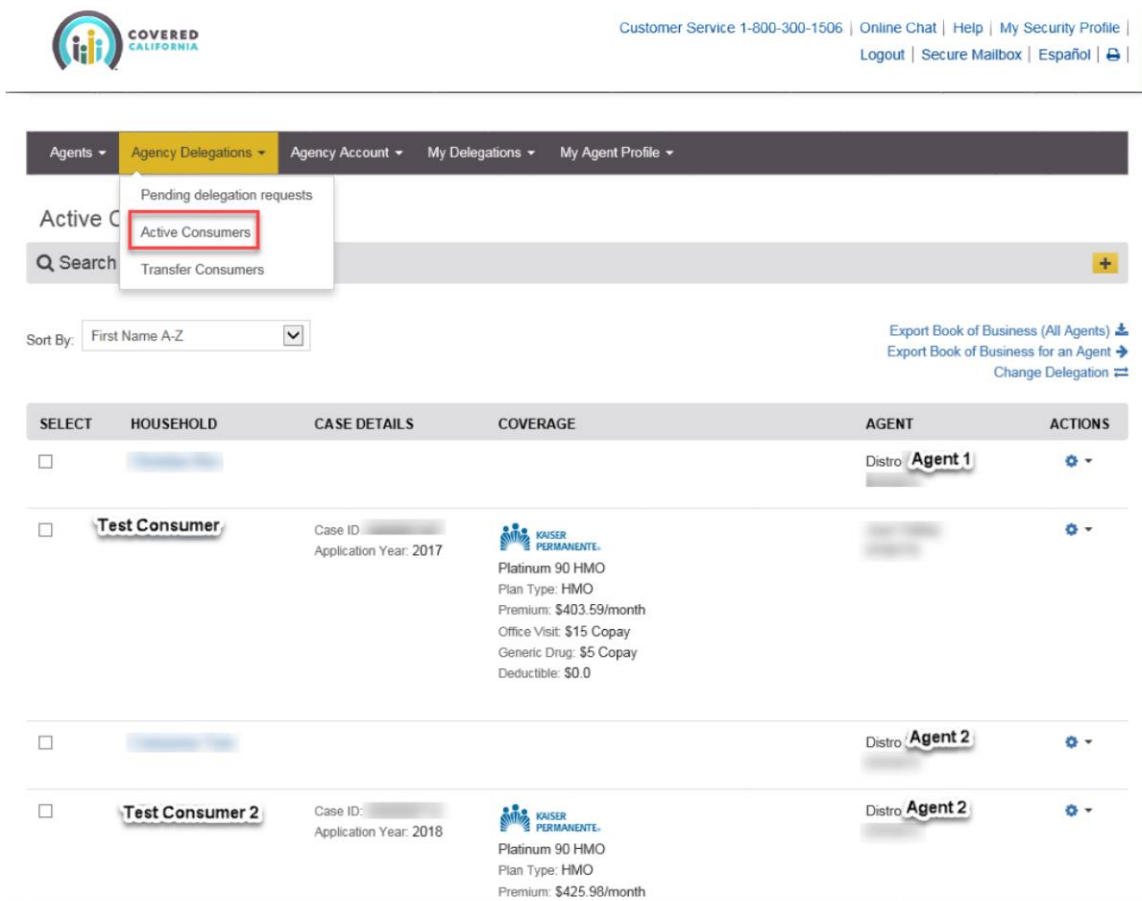
Agency Managers can:

- [View Consumer details](#)
- [Accept an Agent's pending delegation requests](#)
- [Complete and submit an application for a consumer on behalf of the Agent](#)

View Consumer Details

An Agency Manager has access to view Consumer details for all consumer cases delegated to Agents within the Agency.

From the dashboard, under the "Agency Delegations" tab drop-down menu, select "Active Consumers" link to navigate to the **Active Consumers** page.



Customer Service 1-800-300-1506 | Online Chat | Help | My Security Profile | Logout | Secure Mailbox | Español

Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Active Consumers

Pending delegation requests

Active Consumers

Transfer Consumers

Sort By: First Name A-Z

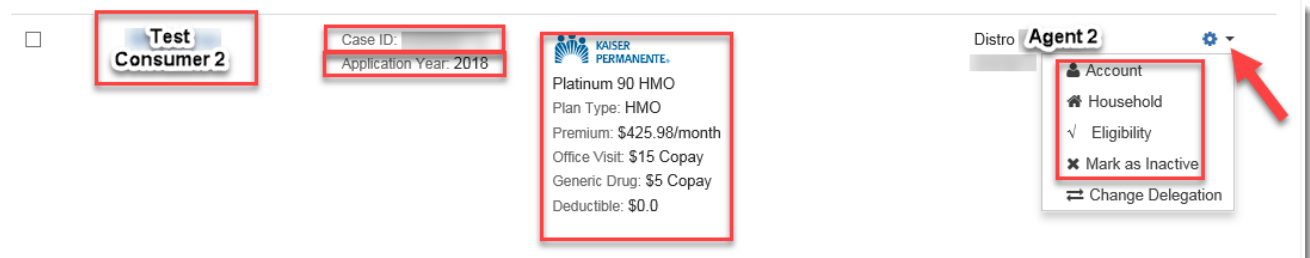
Export Book of Business (All Agents)

Export Book of Business for an Agent

Change Delegation

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>				Distro Agent 1	
<input type="checkbox"/>	Test Consumer	Case ID: Application Year: 2017	KAISER PERMANENTE Platinum 90 HMO Plan Type: HMO Premium: \$403.59/month Office Visit: \$15 Copay Generic Drug: \$5 Copay Deductible: \$0.0		
<input type="checkbox"/>				Distro Agent 2	
<input type="checkbox"/>	Test Consumer 2	Case ID: Application Year: 2018	KAISER PERMANENTE Platinum 90 HMO Plan Type: HMO Premium: \$425.98/month	Distro Agent 2	

The Active Consumer page will display all of the consumers delegated to the Agents within the agency. An Agency Manager is able to view the consumer information and application for any agent listed in this list.




The screenshot shows a consumer card for "Test Consumer 2" with the following details:

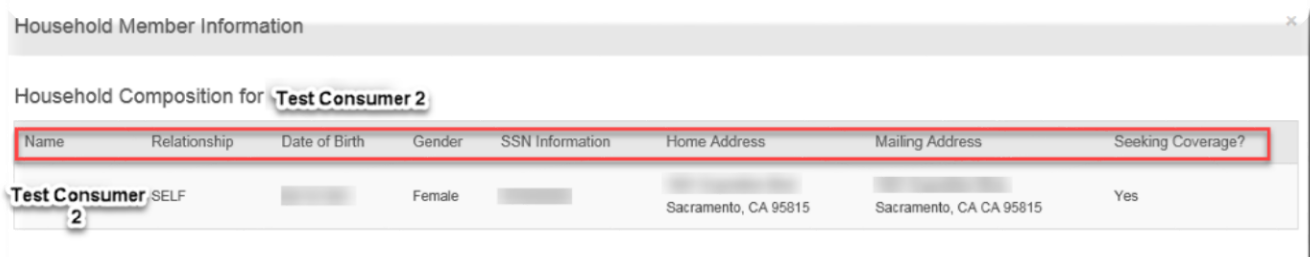
- Case ID: [Redacted]
- Application Year: 2018
- Platinum 90 HMO
- Plan Type: HMO
- Premium: \$425.98/month
- Office Visit: \$15 Copay
- Generic Drug: \$5 Copay
- Deductible: \$0.0

On the right, the "Agent 2" dropdown menu is open, showing options: Account, Household, Eligibility, Mark as Inactive, and Change Delegation. A red arrow points to the "Household" option.

This section displays:

- Consumer Name
- Case Number
- Application Year
- Health Plan Information (if applicable)
- Agent Delegated to the consumer case
- Agent License Number
- Edit Menu 

To view additional consumer data, click on the  and click on the "Household" and/or "Eligibility" links to view additional consumer information.



The "Household Member Information" window displays the following table:

Name	Relationship	Date of Birth	Gender	SSN Information	Home Address	Mailing Address	Seeking Coverage?
Test Consumer 2	SELF	[Redacted]	Female	[Redacted]	Sacramento, CA 95815	Sacramento, CA CA 95815	Yes

Household Information displays:

- Consumer Name
- Relationship to Primary Contact
- Date of Birth
- Gender
- SSN Information
- Home and Mailing Address
- Seeking Coverage Information

Household Eligibility Information

Household Eligibility for **Test Consumer 2**

Covered CA Plan Eligibility: ConditionalEligible
 Available Advance Premium Tax Credit: 4

Name	Medi-Cal Eligibility	Advance Premium Tax Credit	Cost Sharing Reduction
Test Consumer 2	No	No	Yes

Household Eligibility Section Displays:

- Covered California Eligibility Status for the Household
- Available Advance Premium Tax Credit (Dollar Amount)
- Name of the Consumer
- Medi-Cal Eligibility Status
- Advance Premium Tax Credit Status
- Cost Sharing Reduction Status

Accepting Pending Delegations on Behalf of an Agent

Agency Managers can accept pending delegation requests on behalf of the agents within their agency. Agency Managers navigate to the **Agency Delegations** drop-down menu and select “Pending Delegation Requests” from the options.

Agents ▾
 Agency Delegations ▾
 Agency Account ▾
 My Delegations ▾
 My Agent Profile ▾


Pending delegation requests
 Active Consumers
 Transfer Consumers

Refine Results
 First Name
 Last Name
 Agent Status
☐ Active ☐ Inactive
 Certification Status
 Select Certification Status ▾
 License Number
 GO

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Agent	InActive	0		Certified	⚙️
Agent	Active	0		Certified	⚙️
Betsy	InActive	0		Pending	⚙️
Distro	Active	1		Certified	⚙️
Distro	Active	0		Certified	⚙️
Distro	Active	6		Certified	⚙️
	Active	1		Certified	⚙️
New Agent	Active	0		Certified	⚙️


Previous 1 Next

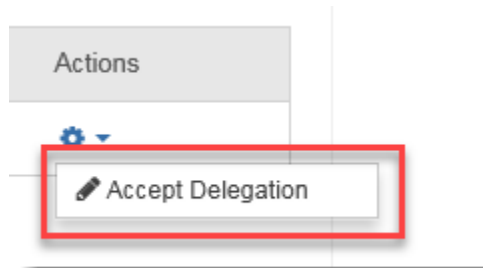
This will navigate the Agency Manager to the “Pending Delegations” page. The Agency Manager will see a list of all consumers requesting delegation with agents within the agency.



The page displays:

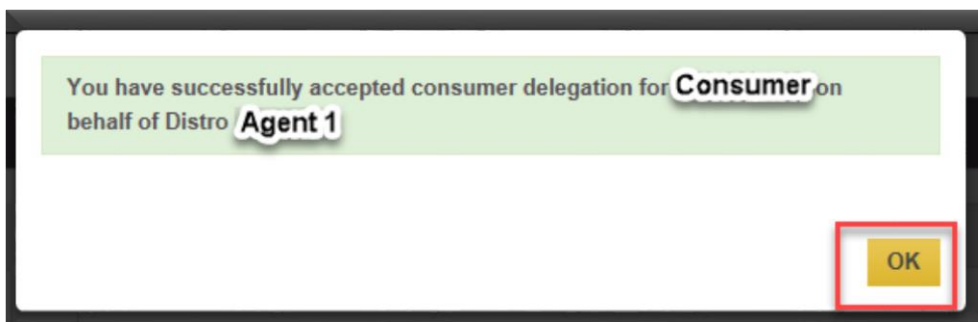
- Consumer Name
- Received on: Date the Request was made by the consumer
- Agent Name: The Agent Requested as a Delegate
- Actions Column

From the **Actions** column, the Agency Manager will click the  and the “Accept Delegation” link will display.



Click on “Accept Delegation” to accept the delegation on behalf of your agent.

The Agency Manager will get a pop-up confirmation screen:

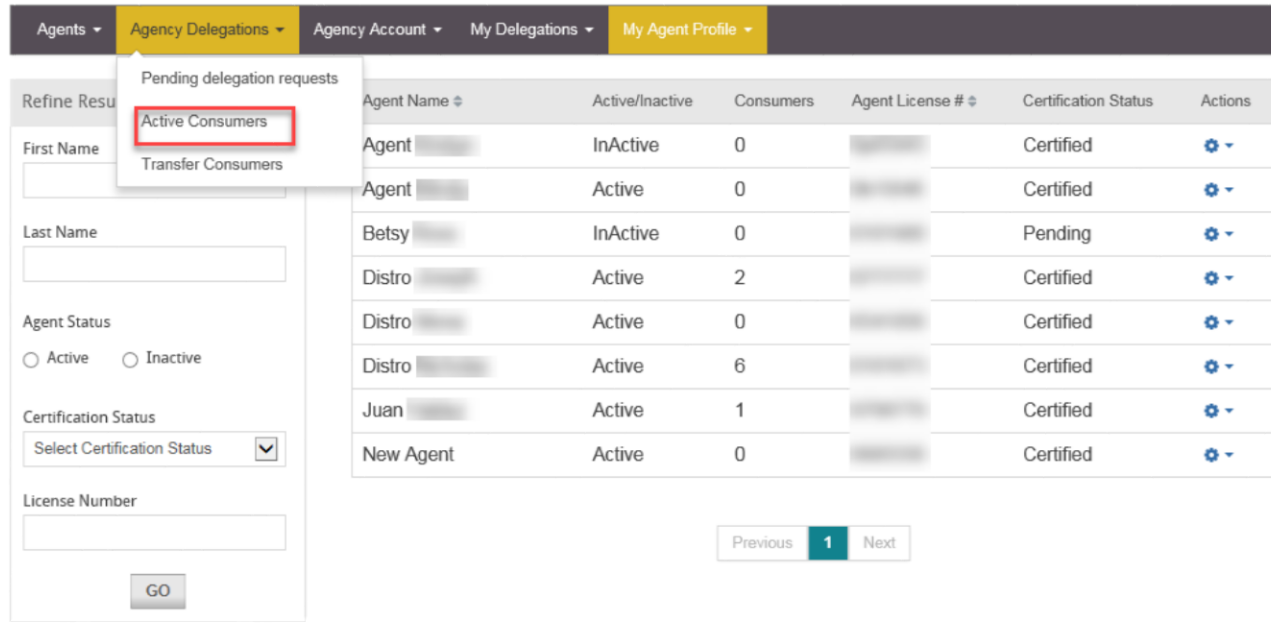


Select “OK” to finalize the delegation to the agent within your agency.

Complete and Submit an Application on Behalf of an Agent

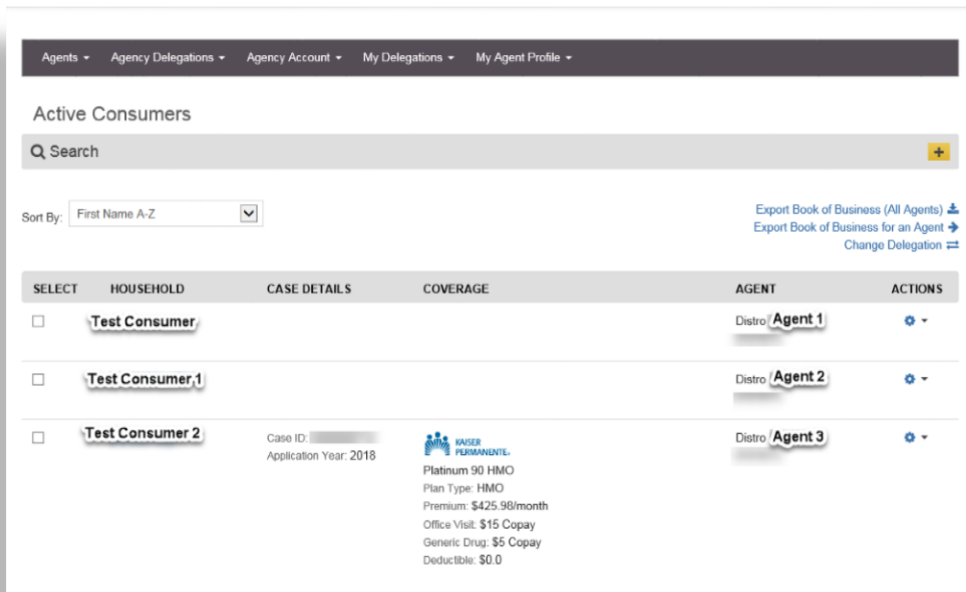
Agency Managers have the ability to assist consumers delegated to the Agents, within the Agency, with application completion and submission.

In the **Agency Delegation** drop-down menu, select “Active Consumers”.



The screenshot shows the 'Agency Delegation' dropdown menu open. The 'Active Consumers' option is highlighted with a red box. The background shows a table of agents with columns: Agent Name, Active/Inactive, Consumers, Agent License #, Certification Status, and Actions.

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Agent [redacted]	InActive	0	[redacted]	Certified	
Agent [redacted]	Active	0	[redacted]	Certified	
Betsy [redacted]	InActive	0	[redacted]	Pending	
Distro [redacted]	Active	2	[redacted]	Certified	
Distro [redacted]	Active	0	[redacted]	Certified	
Distro [redacted]	Active	6	[redacted]	Certified	
Juan [redacted]	Active	1	[redacted]	Certified	
New Agent	Active	0	[redacted]	Certified	




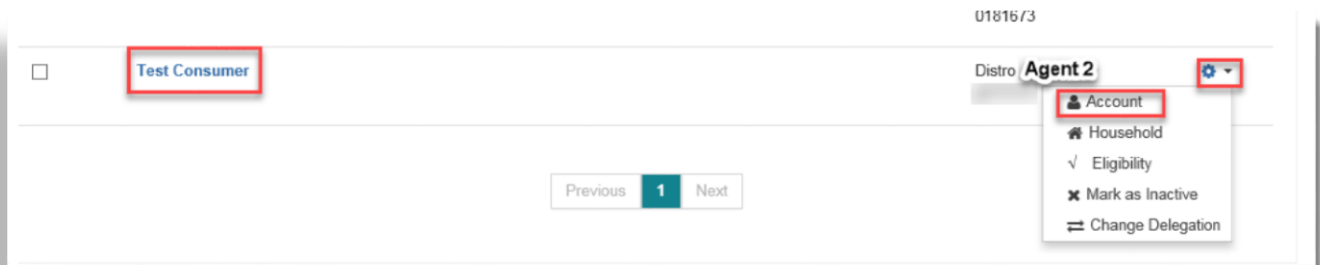
The screenshot shows the 'Active Consumers' page. It includes a search bar, a sort dropdown set to 'First Name A-Z', and a table of consumers. The table has columns: SELECT, HOUSEHOLD, CASE DETAILS, COVERAGE, AGENT, and ACTIONS.

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Test Consumer			Distro / Agent 1	
<input type="checkbox"/>	Test Consumer,1			Distro / Agent 2	
<input type="checkbox"/>	Test Consumer 2	Case ID: [redacted] Application Year: 2018	 Platinum 90 HMO Plan Type: HMO Premium: \$425.98/month Office Visit: \$15 Copay Generic Drug: \$5 Copay Deductible: \$0.0	Distro / Agent 3	

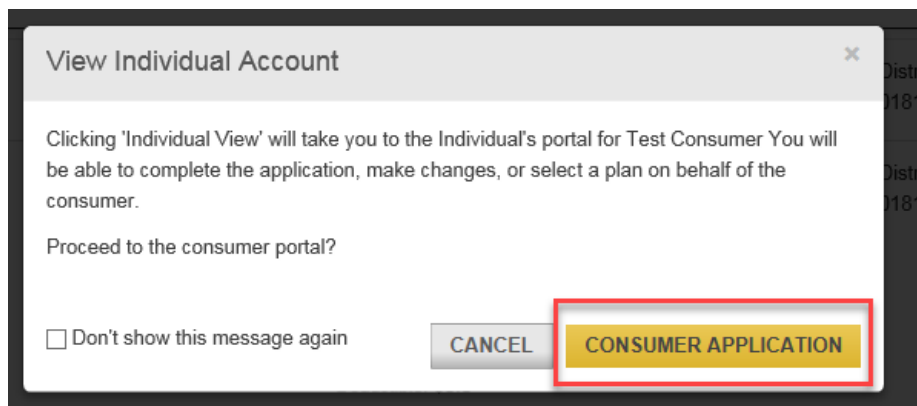
The Agency Manager is navigated to the **Active Consumers** page where there is a complete list of all consumers delegated to Agents within the Agency. Here, the Agency Manager can select the consumer they need to assist with their application.

When the Agency Manager identifies the consumer they are assisting in the list, they can access the consumer case by:

- 1) Clicking the consumer's name, or
- 2) Select  and then click "Account" link



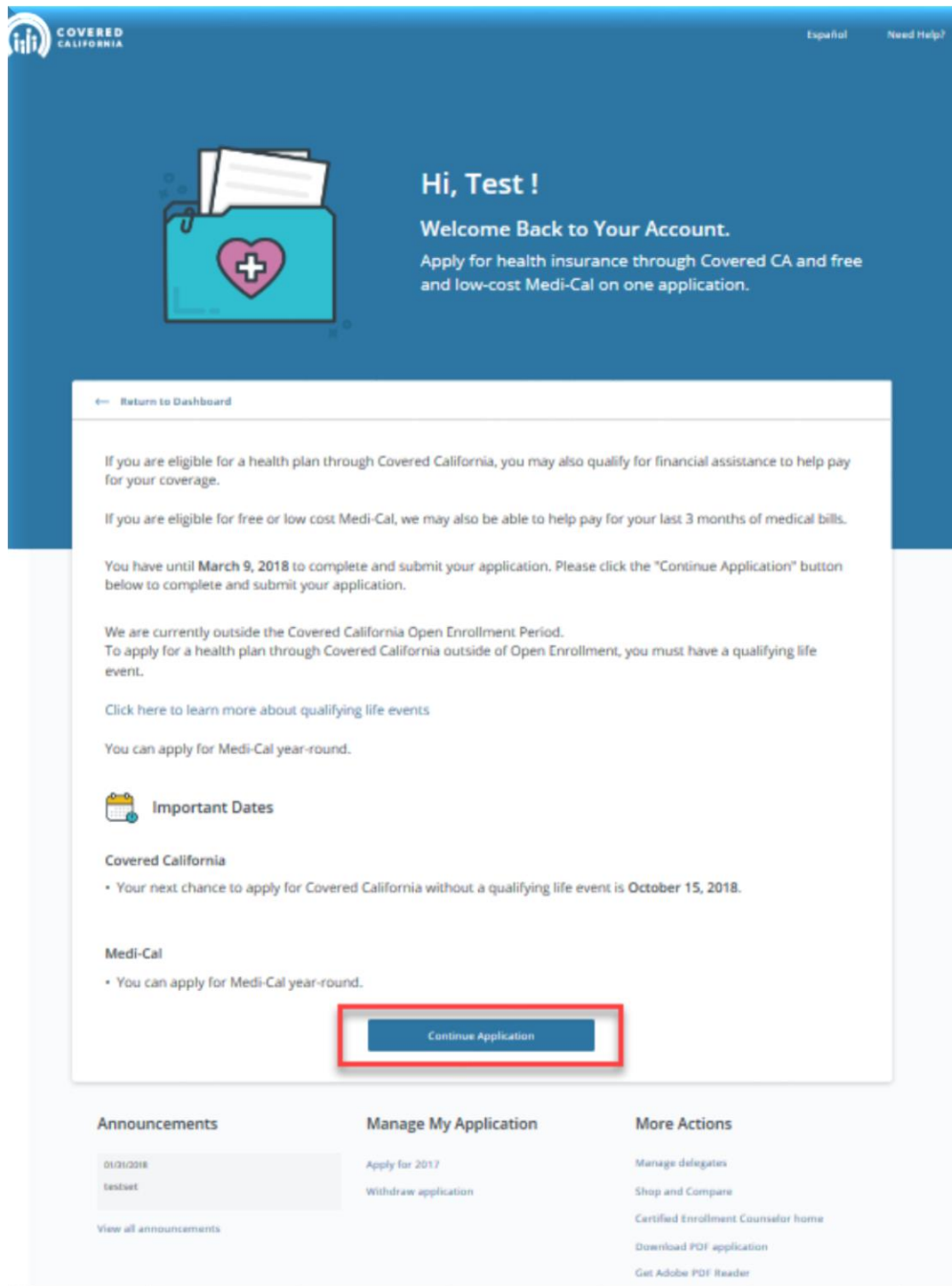
A popup message will display, confirming that the Agency Manager wishes to navigate to the consumer's individual application.



If Agency Manager selected the wrong consumer, the Agency Manager will select "Cancel" button and navigate back to the **Active Consumer** page.

The Agency Manager will select "Consumer Application" button to continue to the application homepage.

The Agency Manager is able to complete a Report a Change, submit the application for an eligibility determination and or assist with plan selections and terminations.



The screenshot shows the Covered California user dashboard. At the top, there's a blue header with the Covered California logo on the left, and links for "Español" and "Need Help?" on the right. Below the header, there's a large blue section with a folder icon containing a heart with a plus sign. The text in this section reads: "Hi, Test !", "Welcome Back to Your Account.", and "Apply for health insurance through Covered CA and free and low-cost Medi-Cal on one application." Below this is a white box with a "Return to Dashboard" link. The main content area contains several paragraphs of text regarding application deadlines and financial assistance. A red rectangle highlights a blue "Continue Application" button. At the bottom, there are three columns: "Announcements" with a date "01/31/2018" and a "View all announcements" link; "Manage My Application" with links for "Apply for 2017" and "Withdraw application"; and "More Actions" with links for "Manage delegates", "Shop and Compare", "Certified Enrollment Counselor home", "Download PDF application", and "Get Adobe PDF Reader".

COVERED CALIFORNIA Español Need Help?

Hi, Test !
Welcome Back to Your Account.
Apply for health insurance through Covered CA and free and low-cost Medi-Cal on one application.

[Return to Dashboard](#)

If you are eligible for a health plan through Covered California, you may also qualify for financial assistance to help pay for your coverage.

If you are eligible for free or low cost Medi-Cal, we may also be able to help pay for your last 3 months of medical bills.

You have until **March 9, 2018** to complete and submit your application. Please click the "Continue Application" button below to complete and submit your application.

We are currently outside the Covered California Open Enrollment Period.
To apply for a health plan through Covered California outside of Open Enrollment, you must have a qualifying life event.

[Click here to learn more about qualifying life events](#)

You can apply for Medi-Cal year-round.

Important Dates

Covered California

- Your next chance to apply for Covered California without a qualifying life event is **October 15, 2018**.

Medi-Cal

- You can apply for Medi-Cal year-round.

Continue Application

Announcements

01/31/2018
testtest

[View all announcements](#)

Manage My Application

[Apply for 2017](#)
[Withdraw application](#)

More Actions

[Manage delegates](#)
[Shop and Compare](#)
[Certified Enrollment Counselor home](#)
[Download PDF application](#)
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